

## 2014 State Controller's Conference with County Auditors

# Daily Agenda

Host County San Luis Obispo ~ Embassy Suites Hotel San Luis Obispo

Friday, November 7, 2014

### Host Updates

8:30am • 9:30am

Auditor-Controller/Treasurer-Tax Collector Consolidation

Panelists: James P. Erb, CPA

Auditor-Controller, County of San Luis Obispo

Donna Dunk, CPA

Assistant Auditor-Controller, County of Sonoma

Larry Walker

Auditor-Controller/Treasurer-Tax Collector  
County of San Bernardino

*Reorganizing and modernizing local government through consolidation. Where does consolidation work? What is the process? What do the Treasurers think? What comes after consolidation? Advantages, disadvantages, and political constraints: lessons learned from the trenches.*

9:30am • 10:25am

The Municipal Advisor Rule

Panelists: Robert Larkins

Managing Director, Raymond James

Mark Campbell

Executive Director, California Debt and  
Investment Advisory Commission

Joan Pan

Debt Finance Manager, County of San Diego

Peter Miller

Managing Director, Public Financial Management, Inc.

Tim J. Schaefer

Senior Finance Advisor, State Controller's Office

*Dodd-Frank Municipal Advisor rules recap, implications, limitations, and practical applications*

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### 15 Minute Break

10:40am • 11:10am    The Uniform Public Construction Cost Accounting Act  
Will Clemens, CUCCAC Commissioner  
Public Works Department Administrator  
County of San Luis Obispo

Linda Clifford, CUCCAC Commissioner  
Chief Financial Officer, C.C. Myers, Inc.

Robert Campbell, CUCCAC Commissioner  
Auditor-Controller, County of Contra Costa

*An overview of the uniform Construction Cost Accounting Act and the benefits available for participating public agencies.*

11:10am • 12:00pm    SCO Accounting and Reporting  
Hitomi Sekine, CPA, CIA  
Chief, Local Government Policy and Reporting Bureau  
State Controller's Office

Tim J. Schaefer  
Senior Finance Advisor, State Controller's Office

*Assembly Bill 2109: Parcel Tax Reporting and introduction to the SCO's Open Data website <https://ByTheNumbers.sco.ca.gov>*

### Lunch

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1:00pm · 2:00pm

Complying with Ethics and Campaign Rules

Lynda Cassidy

Chief, Technical Assistance Division

Fair Political Practices Commission

*An overview of the campaign and governmental ethics rules with tips for compliance, common pitfalls, and latest trends from the enforcement arm of the Fair Political Practices Commission*

2:00pm · 2:55pm

SCO Audits

Jeff Brownfield, CPA

Chief, Division of Audits, State Controller's Office

Elizabeth Gonzalez

Chief, Local Government Compliance Bureau

Division of Audits, State Controller's Office

Mike Spalj

Acting Chief, Local Government Audits Bureau

Division of Audits, State Controller's Office

*Redevelopment Dissolution Audits, Property Tax Audits, Court Audits, and Local Government Internal Control Reviews & Guidelines (AB 1248)*

Closing ~ Conference Adjourned

*Thank You for Attending!*

